



## Instructions for Requests and Reimbursement for Professional Leave

Requests for professional leave are not automatically approved. They must be related to job performance and follow an approval procedure. If you are requesting professional leave, **YOU MUST COMPLETE AND STAPLE TOGETHER a *Leave Request & Absence Certification form (Green Sheet)*, a *Professional Meeting Expense Reimbursement form* and a completed seminar/workshop registration form.**

### Leave Request & Absence Certification Form (Green Sheet)

1. Give the date(s) of the meeting.
2. Provide a short description of the meeting to be attended and attach any brochures or literature.
3. Estimate the cost to the district (This would be the same as the "Total Estimated Expenditures" on the *Professional Meeting Expense Reimbursement form*.)
4. Sign and date the form.

### Professional Meeting Expense Reimbursement Form

1. Complete the name, date(s), and title of the meeting to be attended.
2. Complete the "Estimated Professional Meeting Expenditures" portion of the form.
  - ◆ Registration fees will be paid by the school district prior to a meeting directly to the seminar/workshop sponsor if:
    - a. A staff member is attending a meeting individually and has filled out a *Leave Request & Absence Certification form (Green Sheet)*, a *Professional Meeting Expense Reimbursement form* and a seminar/workshop registration form.
    - b. Multiple staff members from one building are attending a meeting, each attendee has filled out a *Leave Request & Absence Certification form (Green Sheet)* and *Professional Meeting Expense Reimbursement form*; and the principal attaches one completed seminar/workshop registration form to all attendees' forms.
  - Meals are reimbursed to a maximum expenditure of \$20 per day. This may include tax and up to an **18% gratuity**. ***Itemized/dated receipts must be secured for all meals.*** There will be no reimbursement for alcoholic beverages.
  - ◆ Mileage will be reimbursed at the current IRS rate shown on the form. Estimate round trip miles.
  - ◆ There may be miscellaneous expenditures (e.g., parking, turnpike tolls, taxi, etc.). Please estimate these expenditures.
  - ◆ Lodging is to be paid by the attendee and then reimbursed according to the certified and classified negotiated agreements, i.e., \$95 per night for certified staff and \$90 per night for classified staff. This may include all taxes. Please note that if two or more are sharing a room, each must pay separately. Hotels will usually accommodate separate billing. Attendee is responsible for obtaining own lodging.
  - ◆ Total all the estimated reimbursable expenditures.

### Approval Procedure

1. Staple the *Leave Request & Absence Certification form (Green Sheet)*, the *Professional Meeting Expense Reimbursement form* and seminar/workshop registration form (if applicable) together and submit them to the building principal.
2. The building principal will determine the source of funds from which the participant will be reimbursed and secure the appropriate signature.
3. Upon approval by the fund coordinator, the principal will sign the forms and pass them on to the treasurer.
4. The treasurer will determine the availability of funds and give forms to the superintendent for his approval.
5. If the superintendent approves the forms, they go back to the treasurer.
6. The treasurer will process the necessary purchase orders, return the forms to the respective principal/administrator, and pay any pre-registration fees, if applicable.
7. The principal/administrator will inform the staff member of his/her approval.

### Reimbursement Procedure

1. Upon return to work from the professional meeting, the staff member will:
  - Sign and date the "Absence Certification" portion on the *Leave Request & Absence Certification form (Green Sheet)*.
  - Fill in cost of actual expenditures, sign, date and attach itemized/dated receipts to the *Professional Meeting Reimbursement Voucher* (bottom portion of the *Professional Meeting Expense Reimbursement form*).
  - Return the forms to the building principal.
2. Principal checks forms for completeness, signs, dates, and returns forms to the treasurer.
3. Treasurer calculates expenditures costs for amount of reimbursement check and gives forms to superintendent.
4. Superintendent signs the *Professional Meeting Reimbursement Voucher* and returns it to the treasurer.
5. Treasurer processes reimbursement check in a timely fashion and returns check along with copy of *Professional Meeting Expense Reimbursement form* to the staff member.

### Cancellation/Non-Attendance Procedure

1. Check the appropriate "Employee did not attend" or "Meeting postponed" box on the *Professional Meeting Reimbursement Voucher*, sign and return it along with the *Leave Request & Absence Certification form (Green Sheet)* to the building principal.
2. Principal will sign and return forms to the treasurer.
3. Treasurer will cancel any outstanding purchase orders to the staff member and will seek refund of any pre-paid registration fees.